

# Monthly Status Reporting

## Revision Working Team

### Meeting Minutes

**DAY:** 2/6/07  
**TIME:** 1:00pm – 2:00pm  
**LOCATION:** 3900 Conference Room 39A

<b>Meeting Called By:</b>	Gaye Mays		
<b>Meeting Purpose:</b>	Continue to evaluate monthly status reporting process		
<b>Attendees:</b> Unable to attend were Steve Tedder, Daivd Butts, Greg Jones, Lucy Cornelius	Gaye Mays – EPMO Steve Tedder - EPMO David Butts - Wildlife Resources Commission Jim Rhew - DHHS	Bob Giannuzzi - EPMO Barbara Swartz – Strategic Initiatives Richard McGee – EPMO/QA	Greg Jones – Crime Control Lucy Cornelius – DPI Manny Zech – DOT Jim Tulenko- Strategic Initiatives
<b>Meeting Documents:</b>			
<b>Attachments:</b>			
<b>Next Meeting:</b>	No future meetings scheduled		

### Discussion Points

1	<b>Agenda topics :</b> <ul style="list-style-type: none"> <li>• <b>PPM Tool Resource Tracking</b> – Jim Rhew will solicit additional PM's to test this functionality</li> <li>• <b>Monthly Status Reporting – Initiation Phase (Hold, Start, Cancel)</b> – the team agreed on the approach and content of this recommended policy change. Gaye will draft the policy statement and distribute for review</li> <li>• <b>New “one page” status report format</b> – Gaye &amp; Jim Tulenko will work with the UMT support team to determine if this can be added to the reports available in the tool. Jim Rhew will work with Jim Tulenko on other report formats that DHHS would like to see added to the canned reports section of the tool</li> <li>• <b>Milestones Presentation</b> – Dick McGee reported that the milestone presentation was used in the last UMT Tool Training class</li> <li>• <b>Review Top 10 to clarify PPM tool changes needed</b> – the team reviewed each issue that involved the UMT tool so Jim Tulenko could determine if we could change locally or submit to UMT. All the issues reviewed are already on the enhancements list. Jim will provide a copy of the list to all team members.</li> <li>• <b>Future Meetings</b> - The team determined that no future meetings are needed. We will complete the outstanding tasks via e-mail. Gaye will review recommendations with Sharon Hayes.</li> </ul>
2	<b>“Top 10” problems/issues identified with current process:</b> <ol style="list-style-type: none"> <li>1. Difficulties with using the PPM tool/overall inflexibility - <i>the team should provide specific examples to Jim Tulenko</i></li> <li>2. Tool should measure triple constraints (scope, cost, schedule) but currently does not measure these accurately – <i>this will be resolved if we use the resource function in the tool</i></li> <li>3. Project schedule measurement is “time consumption” rather than an “earned value” type metric – <i>this will be resolved if we use the resource function in the tool</i></li> <li>4. Under utilization of resources is viewed as a negative – <i>perception issue within each agency</i></li> <li>5. Need to more clearly define milestones to make them more meaningful – <i>the EPMO QA group has developed a presentation that is being used in the UMT training class</i></li> <li>6. PPM tool does not accommodate the conceptual phase of a project, thus when the project meets the criteria to be input into the tool, the level of detail required may be difficult to capture and the PM must complete a number of “catch up” status reports – <i>a manual reporting format has been approved and is</i></li> </ol>

	<p><i>available for use by the agencies. A recommendation is pending in conjunction with the 90 Day Initiation policy to allow for agencies that adhere to the 90 rule to forego catch up reports for the 90 day period and to report all costs to date with the first month's status report in P&amp;D</i></p> <p>7. PPM tool does not accommodate other development methodologies such as "Agile" – <i>Being addressed by gate review team</i></p> <p>8. Cannot see appropriate detail in current tool status report i.e. detail on issues and risks – <i>Jim Rhew to provide more details to Jim Tulenko</i></p> <p>9. Limited capacity for comments and ability to reference historical information – <i>this issue is already on the UMT enhancement list</i></p> <p>10. Resource management is not integrated into UMT tool. Difficult to accurately reconcile time for all resources. – <i>2 PM's have tested this function within the tool, more testing is needed; Jim Rhew will solicit PM's within DHHS to test</i></p>
3	<p><b>Recommendations (short term):</b> Keep current monthly status reporting process in place with the following changes:</p> <ul style="list-style-type: none"> <li>• Encourage agencies that produce manual status reports to attach in the tool as additional information regarding their project</li> <li>• Flag projects that are under budget overall by 10% as yellow and over by 15% as red</li> <li>• EPMO should provide training/examples on clearly defined milestones – <i>presentation developed &amp; is being used in the UMT training class</i></li> <li>• Implement a 90 day review of projects in initiation to determine if the project will go forward, be put on hold or cancel - <i>policy will be updated and distributed for review</i></li> </ul> <p><b>Recommendations PPM tool (long term):</b></p> <ul style="list-style-type: none"> <li>• Reduce the number of columns in the cost tracking tab</li> <li>• Determine if a one page status report is possible</li> <li>• See updates for "Top 10" issues</li> </ul>
4	<p><b>Project Approach &amp; Updates:</b></p> <ul style="list-style-type: none"> <li>• Define audience for monthly status reports –<i>representative agencies have defined the audience status reports are prepared for in their agency; the PPM tool status report is primarily used by the EPMO QA group</i></li> <li>• Define elements that should be included in status reports – <i>no changes recommended for the current report that is used primarily by the EPMO QA group</i></li> <li>• Define/evaluate status codes (red, green, yellow, etc.) and alerts – <i>only recommended change is to code under budget projects (see above)</i></li> <li>• Collect example reports already in use – <i>completed; a one page status report has been developed</i></li> <li>• Formulate recommendations – identify "quick wins" and long term requirements – <i>completed</i></li> </ul>

## Action Item Updates

1	Validate audience for EPMO monthly status reports – Gaye will discuss with Sharon Hayes – <i>11/15 Sharon advised that the current monthly status reporting process is designed to provide project information to facilitate the QA process.</i>
2	Draft suggested changes to "jelly bean" parameters – Steve Tedder & Lucy Cornelius – <i>11/28 Lucy completed DHHS feedback</i>
3	Evaluate PPM resource tracking functionality – Vicky Kumar & Todd Russ have agreed to test – <i>1/5/07 feedback provided by Todd Russ (see agenda comments) 2/6/07 DHHS will determine if any of their PM's can test</i>
4	Provide feedback on "one page" report format & milestones presentation – <i>2/6/07 completed</i>
5	Jim Tulenko to send UMT enhancement list to team members
6	Jim Rhew to determine if any DHHS PM's can test the UMT resource capability
7	Jim Rhew to work with Jim Tulenko to develop new canned reports in the UMT tool
8	Gaye will complete 90 Day Initiation policy & distribute for review